

***WITS* Training Manual**

Clinical Training

Prepared for:

State of Idaho Provider Training

Prepared by:

FEI.com

November 10, 2008

FEI.com, Inc. behavioral health technology > *moving forward*

WITS Clinical Training

Topics

1. General WITS Tips
2. Accessing WITS
3. Client Search and Profile
4. Intake and the Episode of Care
5. Performing a GAIN in WITS
6. Consents and Referrals
7. Final Notes

General WITS Tips

1. **Context Bar:** This area of the WITS screen gives you a constant reference to the user, agency, facility, and selected client.
2. **Navigation Buttons:** WITS has a number of standard navigation buttons, usually found in the lower right portion of the screen. These are:
 - **Cancel:** Quit the screen without saving.
 - **Go:** Initiate a search or selection.
 - **Save:** Save information and remain on current page.
 - **Finish:** Save information and return to previous page.
 - **Next/Previous:** Takes you to next or previous screen in a particular section.
3. **Action Items:** When clicked, these allow you to perform a function or administrative action. These typically allow you to create or add a record, view a previous activity, or in some cases delete an item. Actions are always underlined.
4. In WITS, required fields are indicated in bright yellow. Fields that are not required to save the record, but are required to complete the record, are light yellow. White fields are not required; gray fields are read only.

User: Conrad, Jennifer
Loc: Administrative Agency,, Administrative Unit
Client:

April 2008, Ver 1

[Diagnostics](#) Print View [Logout](#)

The filter you created has been applied to the client list.

Client Search

Agency Facility

First Name Last Name

SSN DOB

Client ID Provider Client ID

Treatment Staff Primary Care Staff

Case Status Intake Staff

Other Number Number Type

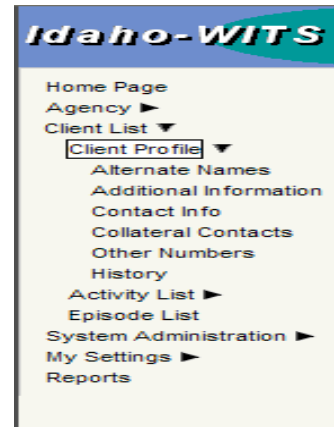
[Add Client](#)

Client List [\(Export\)](#)

Client ID	Full Name	DOB	SSN	Gender	Actions
2119146538100	Aloha, Lulu	1/1/1981	111-23-3456	Female	Profile Activity List

General WITS Tips

5. **Left Hand Menu:** You are able to access any area of WITS open to you by clicking on the left hand menu. On some menu items, an arrow indicates that sub-menus are available.



6. **Searching:** On any search screen, WITS allows you to search for all acceptable records without inputting any criteria. Or, you can narrow your search by inputting known items. Enter the items and click **Go** to begin the search.

Note: You can perform a wild card search to broaden your search. For instance, if you want all individuals with a last name beginning with Sm, enter Sm* in the last name field.

7. When you are finished with WITS, you must log out using the log out button in the upper right hand corner. If you do not, you will not be able to access WITS from a different computer without having your login reset by the WITS Administrator.

General WITS Tips

8. Textbox: Text boxes are designed to allow the user to enter data in manually. Some text fields have specific formats which must be used:
 - DOB/Date: mm/dd/yy
 - SSN: nnn-nn-nnnn
 - Phone Number: nnn-nnn-nnnn
9. Scrolling textbox: Scrolling text boxes are used to capture notes and descriptions. A scrolling text box allows the user to enter at least 500 characters. Some have no character limits. An example of a scrolling text box is a Comment field.
10. Drop-down box: A drop-down box is used when only one entry may be selected from a list of values.
11. Mover Box: A mover box is used when more than one entry may be selected from a list of values. Some may scroll.
12. Mover Box with Radio Buttons: The user selects an option with a single left click. Before selecting the mover arrow, they must select an option, using the radio buttons located between the boxes. In this example, if the user selects # of days, they click the Radio Button, and put the number of days in the textbox using the keyboard. The user then moves the options to the select box using the upper arrow adjacent to the Selected box.

First Name

First Name Shirley Note: When a field is read-only, it is grayed-out.

DOB 3/3/00 → 3/3/2000

SSN

Phone Number 301-942-2222

Comments

Living Arrangement 1-Homeless/Shelter

Race Selected Race
 Alaska Native American Indian
 Asian Indian
 Black, African Am., Or Negro
 Chinese

Ethnicity Selected Ethnicity
 Cuban Mexican, Mexican American, Chicano
 Not Spanish/Hispanic/Latino Other Spanish/Hispanic/Latino
 Puerto Rican

Consent Options Consent Expires Upon Selected Options
 Admission Discharge
 Client Diagnosis # of Days
 Client Information/Summary
 Client Needs Matching

November 10, 2008

Accessing WITS

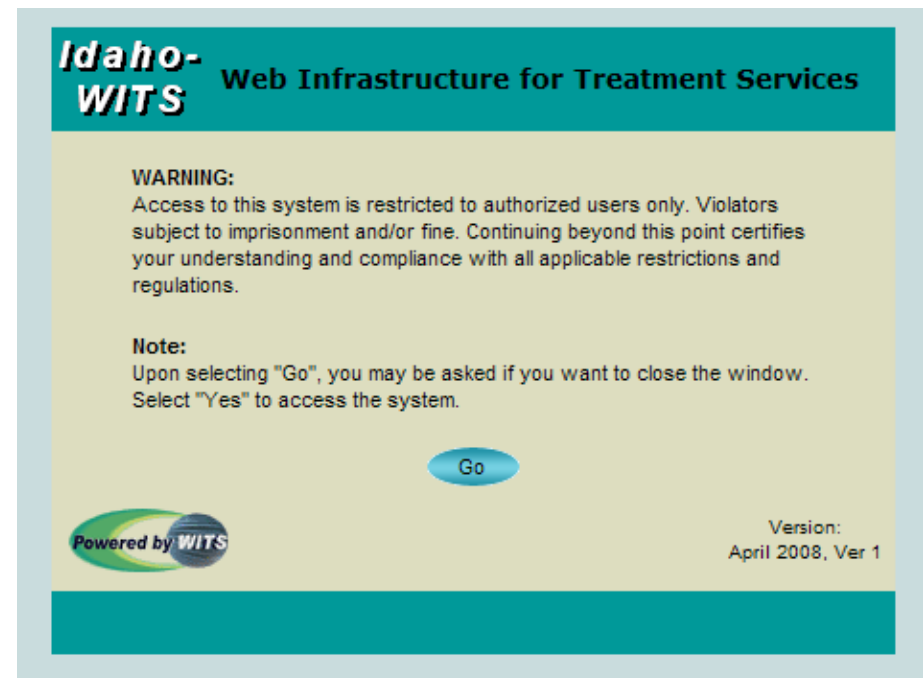
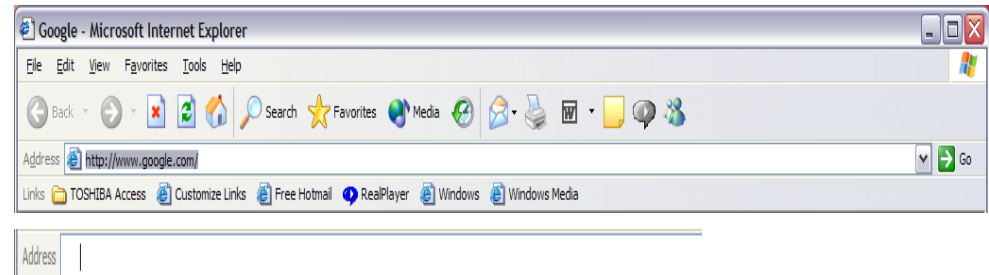
Using Your Browser to Access WITS

1. **Browser:** WITS requires Internet Explorer 6.0 and higher. To access WITS, backspace over the address in the address line, and type the following URL in the Address Line of your browser, and hit the enter key.

TRAINING: <http://idaho-training.witsweb.org>

2. Make sure you have pop ups turned OFF.
3. **Warning Message Box:** You will be warned that you must be authorized to use the site. Click **Go** if you are authorized. (If you have a User ID and a Password, you are authorized to enter WITS.)

NOTE: Once you are assigned a login to the production site, where you will enter live client information, you will have a different URL. That will be: <http://idaho.witsweb.org>



Accessing WITS

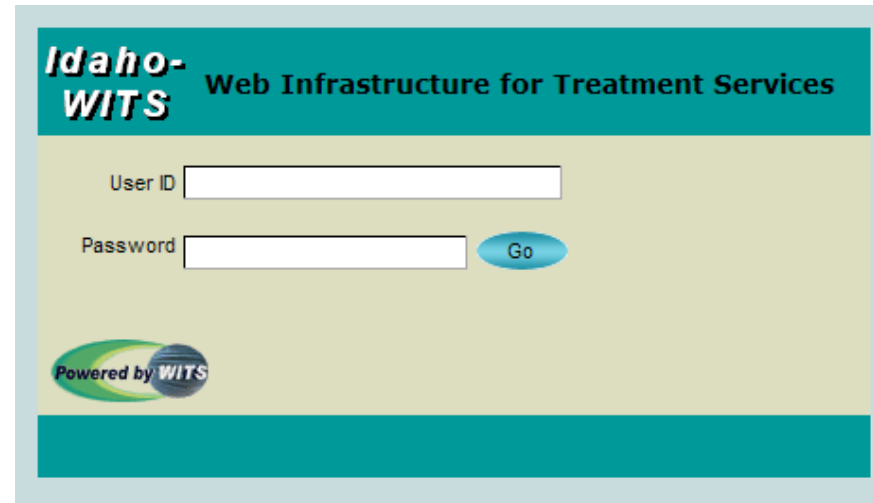
Identity Management

1. You will receive a system generated email with the following information: Log in name (User ID), initial password and initial pin.
2. **User ID:** WITS requires each user to enter their ID. The user ID may follow a convention such as the first letter of the first name, and the last name, or it may be random. You should have received an ID from your WITS Administrator. If you have not received your **User ID**, contact your WITS Administrator. After entering your User ID, hit tab to enter your password or mouse click inside the **Password** box.

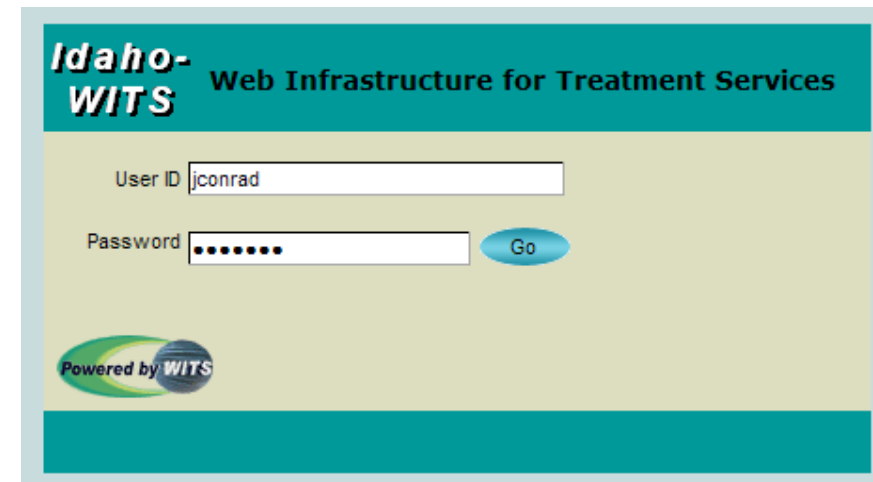
Note: Your **User ID** will never change.

3. **Password:** To manage your identity, a password has been assigned to you. As you type it in, you will see small circles for each character to maintain the security. After entering your password, click **Go**.

Note: When you log in for the first time and periodically thereafter you will be prompted to change your password. Change it to something you will remember and that someone else could not easily guess.



The screenshot shows the Idaho-WITS login interface. At the top, a teal header contains the text "Idaho-WITS" in a stylized font and "Web Infrastructure for Treatment Services" in a standard font. Below the header, on a light beige background, are two input fields: "User ID" and "Password". To the right of the "Password" field is a blue oval button labeled "Go". In the bottom left corner, there is a logo that says "Powered by WITS" with a circular graphic element.



This screenshot shows the same Idaho-WITS login interface as the previous one, but with user input. The "User ID" field now contains the text "jconrad". The "Password" field is filled with ten black dots. The "Go" button and the "Powered by WITS" logo remain in the same positions.

Accessing WITS

Identity Management

4. **PIN:** After clicking on **Go** next to the password, you will be asked for your PIN. To manage your identity, a Personal Identification Number (PIN) has been assigned to you. It will be lengthy and will not appear to follow any convention. This is to prohibit someone from being able to guess your PIN, and access the system as you. After entering your PIN, click **Go**.


Note: When you log in for the first time and periodically thereafter you will be prompted to change your pin. Change it to something you will remember and that someone else could not easily guess.

The screenshot shows the login page for Idaho WITS (Web Infrastructure for Treatment Services). The page has a teal header with the text "Idaho-WITS" and "Web Infrastructure for Treatment Services". Below the header, there are two main sections. The first section contains a "User ID" field with the text "jconrad" and a "Password" field with masked characters (dots). To the right of the password field is a grey "Go" button. The second section contains a "PIN" field with masked characters (dots) and a blue "Go" button. At the bottom left of the page is a logo that says "Powered by WITS".

Accessing WITS

Home Page

1. Your Home Page will tell you how many clients have been referred to your agency.
2. You will see any announcements for your agency.
3. You can set up a schedule for yourself and edit it.

 There are currently 1 people that have been referred in.

Home WITS Version : April 2008, Ver 1

Announcements

Summary	Posted Date	Start Date	Actions
I want everyone to have fun at the training today	5/12/2008 1:35 AM	5/11/2008	Review

Schedule for: [Refresh](#) [Edit/Add Schedule](#)

Start	End	Summary	Status	Actions

Accessing WITS

Agency and Facility Setting

1. Once you have successfully logged into WITS, you'll be directed to the "Change Facility" screen. Most users will be associated with one **Agency**, but may be associated with many **Facilities**.
2. Use the drop down boxes to choose the Facility you wish to be working in. The drop down includes only those facilities to which you have been given access. Everything you do (with a client record will be within the limits of this facility that you select. The exception is the client search – because clients are within the higher context of an agency. Once you have selected your Agency, click **Go**.

Note: If you have access to one facility only then this screen will not appear. You will go immediately to the **Home Page**.

Note: You may use **Cancel** and go to the menu on the left. However, you will not be able to access any client records until you have picked a context.

3. At the top of your screen, you will now be able to view your **Context**. Context defines the boundaries within which you can work within this session. It always shows the logged in user, the Agency and Facility, and, once a client has been chosen, the client.

Change Facility

Current Agency Administrative Agency,
Current Facility Administrative Unit
New Agency Administrative Agency,
New Facility Administrative Unit

Cancel Go

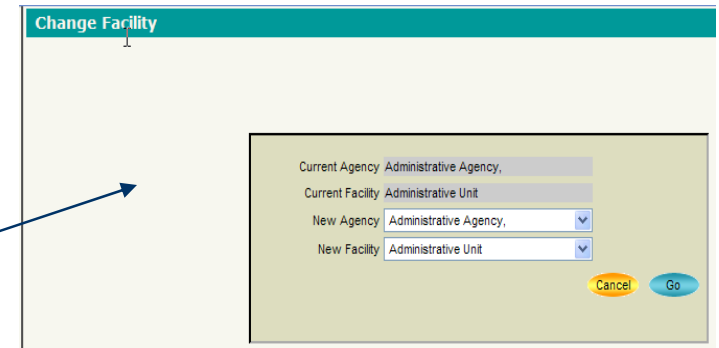
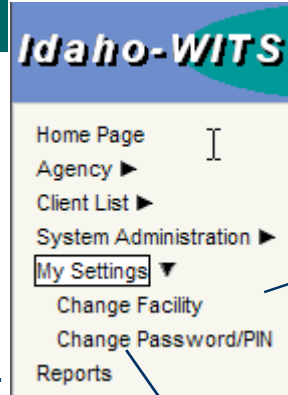
Idaho-WITS

User: Conrad, Jennifer
Loc: Administrative Agency,, Administrative Unit
Client: **One, Thing** | 1539287547100 | Case #: 1

Accessing WITS

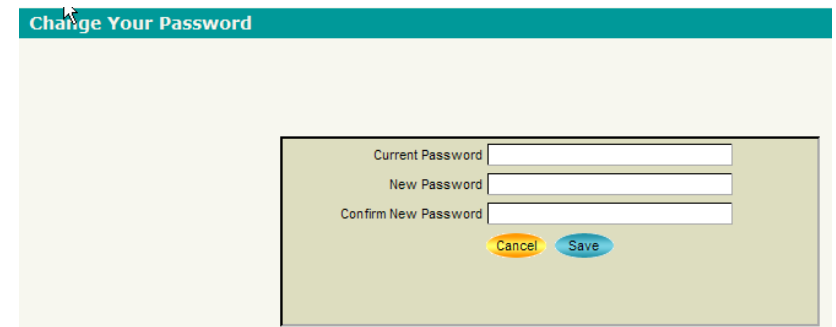
Changing Password and Context

1. Go to **My Settings**. You will see menu options that will allow you to make changes to your context **Agency** (if you have access to more than one agency), **Facility** (again, if you have access to more than one), **Password**, and **PIN**.



A screenshot of the 'Change Facility' form. It contains the following fields and controls:

- Current Agency: Administrative Agency, (text field)
- Current Facility: Administrative Unit (text field)
- New Agency: Administrative Agency, (dropdown menu)
- New Facility: Administrative Unit (dropdown menu)
- Buttons: Cancel (yellow), Go (blue)



A screenshot of the 'Change Your Password' form. It contains the following fields and controls:

- Current Password (text field)
- New Password (text field)
- Confirm New Password (text field)
- Buttons: Cancel (yellow), Save (blue)

Client Search and Profile

Overview: All information within WITS is eventually tied to a client and an intake. Each client is owned by an Agency; individuals outside of your agency do not have access to your clients unless you specifically consent and refer within WITS.

1. From the Agency Home Page, click on Client List in the left-hand menu.
2. Before entering a new client in the system, you should always search for an existing record. Using the Client Search screen, enter any fields you wish to use in your search. The more information you enter, the narrower you make the search. After you enter your search criteria, click **Go**. The system will return any records that match your search criteria.

Note: You can perform a wild card search to broaden your search.

For instance, if you want all individuals with a last name beginning with Sm, enter Sm* in the last name field.

You can also use a “wild” search on dates: 01/01/2000 : 12/31/2000 – returns any record with a date in the year 2000.

Note: You can search for the client by a known “Alternate Name” or alias.

3. If you find the client, click on Profile or Activity List to view. If you do not find the client, you will need to create a new one.

Client List (Export)						Add Client
Client ID	Full Name	DOB	SSN	Gender	Actions	
180966667110	Mouse, Mickey	8/10/1976	123-54-6666	Male	Profile Activity List	
1259811116110	Nelson, Bob	2/15/1968	123-12-1111	Male	Profile Activity List	
2439275687100	Test, Jennifer	4/3/1972	234-53-8765	Female	Profile Activity List	

Client Search and Profile

- If you don't find the client, click on **Add Client** to add a new client.
- Enter all information in the Client Profile. Make sure that information is entered accurately, as it will affect future searches for the client in WITS and in GAIN ABS.

Note: The Gender, DOB and SSN fields are particularly important, as they feed into the system-generated Client ID field. Once the Client ID has been created by WITS, it cannot be changed.

- You do not need to enter additional information; however, if the individual is under 16 you will be required to enter at least one collateral contact.
- Once you have entered all information, click **Finish** or **Save**.

Note: It is really important to get the client's social security number up front. However, if this is impossible, the system will accept "000-00-0000" as a dummy SSN. This is the only SSN you may enter more than once.

- Once you choose or create a client, you will see the client's name appear in the Context area of your WITS navigation bar.

Client Profile

Other Client Information

The other Client Information Pages can be used to capture additional information about clients as follows:

1. Alternate Names: Known Aliases used by the client. Information entered can be viewed in the list, and either reviewed or deleted. You can add an Alternate Name by clicking on **Add Alternate Name**. Enter desired information, then select **Finish or Next**.

Note: If you enter a client alias or alternate name, you will be able to search for the client at a later time using this name.

2. Additional Information: Race, ethnicity, special needs, general comments and language information. Enter desired information, then select **Save, Finish, or Next**.

Note: To close the intake at discharge, you must have all "light yellow" fields complete on the Client Profile, and your client must have at least one address.

The screenshot shows the 'Alternate Names' form. On the left is a navigation menu with options: Home Page, Agency, Client List, Client Profile (selected), Alternate Names, Additional Information, Contact Info, Collateral Contacts, Other Numbers, History, Activity List, Episode List, and System Administration. The main form area has a table with columns: Last Name, First Name, Middle Name, and Actions. The first row contains 'Mick' in the First Name column and 'Review' and 'Delete' links in the Actions column. Below the table are input fields for First Name, Middle Name, and Last Name. At the bottom right is a green button labeled 'Add Alternate Name'. At the bottom center are three buttons: 'Finish', 'Previous', and 'Next'.

The screenshot shows the 'Additional Information' form. It features several sections: 'Races' with a list of options (Alaska Native, Asian, Native Hawaiian or Other Pacific Islander, Other Single Race, Two or More Races) and a 'Selected Races' box; 'Ethnicity' with a dropdown menu; 'Special Needs' with a list of options (None, No Response, Moderate To Severe Medical Problems, Organically Based Problem) and a 'Selected Special Needs' box; 'General Client Comments' with a text area; 'English Fluency' with a dropdown menu; 'Primary Language' with a dropdown menu; 'Interpreter Needed' with a dropdown menu; and 'Citizenship' with a dropdown menu. At the bottom right are five buttons: 'Cancel', 'Save', 'Finish', 'Previous', and 'Next'.

Client Profile

Other Client Information

3. Contact Info: Captures Name and Address Information. Enter any phone numbers or an email address, then select **Save, Finish, or Next**. If you want to add an address, click **Add Address**.

Note: You do not have to input an address to save the record, but you must add the address to have a completed client profile. You must complete the client profile before you can close the intake at time of discharge.

4. Add desired address information and then click **Finish**.

The screenshot displays the 'Client Profile' form. On the left is a navigation menu with options: Home Page, Agency, Client List, Client Profile (selected), Alternate Names, Additional Information, Contact Info, Collateral Contacts, Other Numbers, History, Activity List, Episode List, System Administration, My Settings, and Reports. The main form is divided into two sections: 'Contact Info' and 'Addresses'.

Contact Info section includes fields for Home Phone #, Work Phone #, Mobile Phone #, Other Phone #, and Fax #. It also shows 'Created' (4/24/2008 12:32 PM) and 'Updated' (4/24/2008 12:45 PM) timestamps. An 'Email Address' field is located below the phone numbers.

Addresses section features a table with columns: Address Type, Address, Confidential, Created, Updated, and Actions. An 'Add Address' link is positioned to the right of the table. Below the table are buttons: Cancel, Save, Finish, Previous, and Next.

Address Information section (shown in a separate view at the bottom) contains fields for Address Type (dropdown), Address Line 1*, Address Line 2, City*, State* (dropdown), and Zip*. It also includes a 'Confidential' checkbox (set to 'No') and 'Cancel' and 'Finish' buttons. Arrows from the instructions point to the 'Add Address' link and the 'Finish' button.

Client Profile

Other Client Info

5. Collateral Contacts: Any contacts that might be useful to the client's treatment. Can include school, judicial, family, etc., as well as the ability to indicate consent to contact.

All existing Collateral Contacts will appear in the list area.

You can review or delete an existing Collateral Contact.

To add a new contact click the **Add Contact** hyperlink.

Enter relevant information, and click **Save or Finish**.

Note: If the client is under 16 at the time of entry, you must enter at least one collateral contact to save the record.

First Name	Last Name	Relation	Phone Numbers	Can Contact?	Actions
Barry	Manlow	Father		Yes	Review Delete

[Add Contact](#)

First Name Last Name

Relation Gender

Date of Birth SSN

Home Phone Work Phone Mobile Fax Other

Address 1 Address 2

City State Zip

Email

Can Contact Consent On File

Notes

Created Last Update

Client Profile

Other Client Info

6. Other Numbers: A way to record numbers, such as case numbers, IDOC numbers, etc. for the client (these are searchable items on the client search page).

You can **Review** existing other numbers.

Or you can add other numbers by clicking the **Add Other Number** action button.

After entering information, click **Save or Finish**.

Note: You cannot delete Other Numbers once they have been used; however, you can enter an end date and inactivate them for future use in the system.

Number Type	#	Start	End	Contact Name	Status	Actions
Department of Correction	48576	4/24/2008			Active	Review

[Add Other Number](#)

Number Type: [dropdown]
Number: [text]
Start Date: 5/12/2008
End Date: [calendar]
Status: Active [dropdown]
Contact: [dropdown] [Add Contact](#)
Comments: [text area]
[Cancel] [Save] [Finish]

Intake

Creating an Episode of Care

In WITS, all activities are based upon an active episode of care, which is started by an intake. A client may have more than one active episode of care, but these must be in different FACILITIES.

You must do an intake to perform any client activities in the system.

1. You can view any episode, whether open or closed, by clicking on the Client's Episode List in the left hand menu, then choosing to review the Episode.
2. If you want to start a new Episode of Care, click on **Start New Episode**.
3. You can also get to a new Intake screen by selecting Intake under the Activity List in the left hand menu.

Note: You cannot start a new episode in the same facility if the existing episode's status is Open Active.

4. Enter all required information for the Intake. The system will pre-fill some information for you, and will keep track of the case number (intake number).
5. Click on **Save or Finish**.

Case #	Status	Facility	Intake By	Intake Date	Closed Date	Actions
1	Open Active	Test Facility	Conrad, Jennifer	4/24/2008		Review

Intake Case Information

Intake Facility: Administrative Unit
Intake Staff: Conrad, Jennifer
Initial Contact: [dropdown]
County of Res: [dropdown]
Source of Referral: [dropdown]
Referral Contact: [dropdown]
[Add Referral Contact Info](#)

Case # 2
Case Status: Open Active
Date of First Contact: [dropdown]
Intake Date: 5/5/2008
Pregnant: [dropdown] Due Date: [text]
HIV Positive: [dropdown]
Past IV Drug Use: [dropdown]

Presenting Problem (In Client's Own Words): [text area]

Special Initiative: [dropdown]
Special Initiative Selected: [text area]

Inter-Agency Service: [dropdown]
Inter-Agency Service Selected: [text area]

Date Closed: [text]

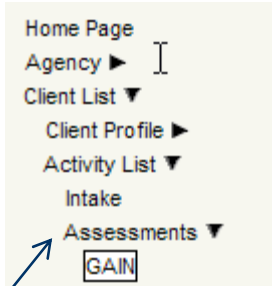
Buttons: Cancel, Save, Finish

Assessments: GAIN

Creating the Client in GAIN ABS

You must have a GAIN Agency ID number (which must be entered by the Agency Administrator in the Agency Profile screen), and your own GAIN-ABS login and password to complete a GAIN assessment.

1. Access the GAIN Administration Screen from the Client Activity menu; click Assessments and then on GAIN.
2. You must first create the client in the GAIN ABS system. Click on **Sync Client Profile**. This creates the client in the GAIN ABS system and will enable the **Perform GAIN Assessment** link.



In order to start a GAIN assessment, you must do the following:

1. Complete Client Profile Module in WITS.
2. Use the Sync Client Information action button below to send the Client Profile information to GAIN.
3. When you receive an information message that the record was "Successfully Synced", click on the Perform GAIN Assessment action button to launch a GAIN window. You will need a GAIN account to do this. (If you don't have a GAIN Account, please call your WITS Administrator).
4. After completing the GAIN-I Assessment, click the Download / Update GAIN Summaries action button, which will pull the GAIN information back into WITS so that it can become part of the Client's electronic medical record.
5. To view a completed GAIN-I Summary, click the Review action button.
6. If you are doing a GAIN-Q Assessment, click the action item "Create GAIN Q Activity" after performing the assessment in the GAIN ABS system. This will create an activity record for this client's GAIN-Q Assessment.

GAIN Domain	Created Date	Last Sync Date	Sync Status	Actions

Administrative Actions

[Sync Client Profile](#) [Perform GAIN Assessment](#) [Download/Update GAIN Summaries](#) [Create GAIN Q Activity](#)

Assessments: GAIN

Creating the Client in GAIN ABS (cont)

3. The system will give you a message at the top of the screen, telling you the sync was successful.
4. A successful client sync enables the **Perform GAIN Assessment** button.
5. Click on **Perform GAIN Assessment**. This will open the GAIN-ABS window right on your screen, without closing WITS.

The screenshot displays the Idaho-WITS web application interface. At the top, a blue header bar contains the user information: "User: Conrad, Jennifer", "Loc: Administrative Agency,, Administrative Unit", and "Client: Child, Needy | 2559301009100 | Case #: 1". A "Logout" link is visible on the right. Below the header, a yellow banner displays a message: "Successfully Synced at 7:18 PM on Tuesday, June 03, 2008." Below this, a box contains instructions for starting a GAIN assessment. A table with columns "GAIN Domain", "Created Date", "Last Sync Date", "Sync Status", and "Actions" is shown. Below the table, a section titled "Administrative Actions" contains four buttons: "Sync Client Profile", "Perform GAIN Assessment", "Download/Update GAIN Summaries", and "Create GAIN Q Activity". A red arrow points from the "Perform GAIN Assessment" button to the "Perform GAIN Assessment" button in the "Administrative Actions" section.

Idaho-WITS

User: Conrad, Jennifer
Loc: Administrative Agency,, Administrative Unit
Client: Child, Needy | 2559301009100 | Case #: 1

April 2008, Ver 1

Diagnosics

Logout

Successfully Synced at 7:18 PM on Tuesday, June 03, 2008.

In order to start a GAIN assessment, you must do the following:

1. Complete Client Profile Module in WITS.
2. Use the Sync Client Information action button below to send the Client Profile information to GAIN.
3. When you receive an information message that the record was "Successfully Synced", click on the Perform GAIN Assessment action button to launch a GAIN window. You will need a GAIN account to do this. (If you don't have a GAIN Account, please call your WITS Administrator).
4. After completing the GAIN-I Assessment, click the Download / Update GAIN Summaries action button, which will pull the GAIN information back into WITS so that it can become part of the Client's electronic medical record.
5. To view a completed GAIN-I Summary, click the Review action button.
6. If you are doing a GAIN-Q Assessment, click the action item "Create GAIN Q Activity" after performing the assessment in the GAIN ABS system. This will create an activity record for this client's GAIN-Q Assessment.

GAIN Domain	Created Date	Last Sync Date	Sync Status	Actions

Administrative Actions

Sync Client Profile → Perform GAIN Assessment Download/Update GAIN Summaries Create GAIN Q Activity

Assessments: GAIN

Performing the GAIN

1. Enter your login information, including login name and password.

Note: These are different from your WITS user name and password.

2. Hit Login.

GAIN ABS

Build Number (Beta 3): 0.3.9.6

Login Name : jconrad1@feinfo.com

Password :

☒ Remember my login name

Login

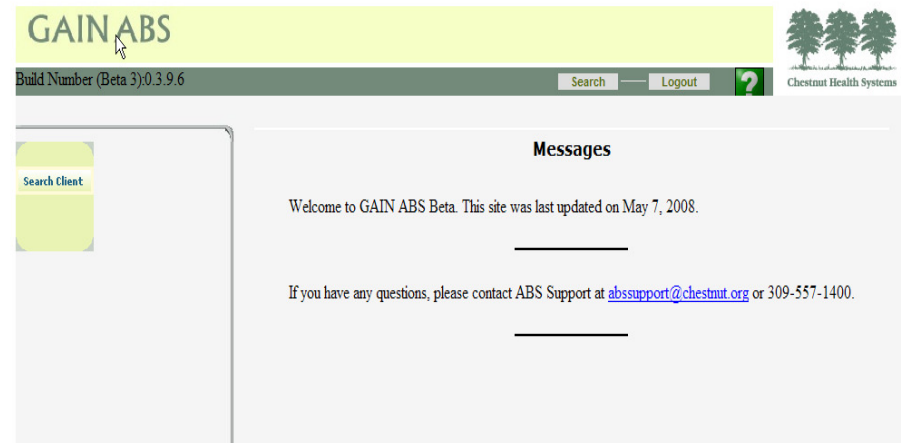
NOTE: If you encounter any problems with the GAIN ABS website, please contact abssupport@chestnut.org or 309-451-7700 for assistance. Your WITS Administrator cannot help you with GAIN ABS issues.

Online GAIN training: <http://training.gainabs.org/>

Assessments: GAIN

Performing the GAIN (2)

3. Click on "Search Client".



4. Find your client using the search client function.

The screenshot shows the GAIN ABS search client form. The header includes the GAIN ABS logo, the build number (Beta 3) 0.3.9.6, and navigation links for Main, Search, Logout, and a help icon. The form contains fields for Criteria (set to 'Any'), Last Name (with 'child' entered), First Name, SSN, Client Number, and Date Of Birth. There are 'Search' and 'Clear' buttons, and an 'Add New Client' button at the bottom. A blue arrow points from the instruction 'Find your client using the search client function.' to the search form.

Assessments: GAIN

Performing the GAIN (3)

- Click on the client's name to select. Note: Your search may return more than one client.

GAIN ABS

Build Number (Beta 3):0.3.9.6

Main Search Logout

Criteria: Any

Last Name: child

First Name:

SSN:

Client Number:

Date Of Birth:

Search Clear

Client Name	Date of Birth	SSN	Client Number
Needy Child	05/05/1993	000-00-0001	2559301009100

- Click on the Client record button.

GAIN ABS

Build Number (Beta 3):0.3.9.6

Main Search Logout

Needy Child Client Record

Create New Treatment Episode

Edit Client

Client Record View

Needy Child Client Record

Treatment Episode 1 (06/03/2008)

- Note that the Treatment Episode button is now green and the menu changes. Click on it the Episode button to select the Episode.

- Click on the GAIN I or GAIN Q instrument.

GAIN ABS

Build Number (Beta 3):0.3.9.6

Main Search Logout

Treatment Episode 1

GAIN-I Interactive Interview

GAIN-I Data Entry

GAIN-Q Interactive Interview

GAIN-Q Data Entry

Client Record View

Needy Child Client Record

Treatment Episode 1 (06/03/2008)

Assessments: GAIN

Performing the GAIN (4)

9. Begin the Assessment.

GAIN ABS
Build Number (Beta 3) 0.3.9.6

Assessment Header

Instrument Type	: GAIN-I	Participant ID	: 2559301009100
Instrument Version	: 5.6.0	Treatment Participant ID	:
Template	: GAIN-I 5.6.0 Full	Participant Last Name	: Child
	<input type="button" value="Interactive"/> <input type="button" value="Data Entry"/>	Participant First Name	: Needy
Data Entry Staff Id	: 102	Participant Middle Initial	:
Initial Key Date	: 6/3/2008	Social Security Number	: 000-00-0001
Initial Key Time	:	Other/State ID	:
Edit Staff ID	: 102	Observation Value	: 0
Edit Date	: 6/3/2008	Observation Verbatim	:
Study Site ID	: witstestone	Assessment Date	: 6/3/2008
Local Site ID	:	Reference Date	:
Staff Id	: 102	What time is it?	: 06:19
Staff Initials	: JC	Is it currently morning or afternoon (AM/PM)?	: <input checked="" type="radio"/> Morning <input type="radio"/> Afternoon
Language	: English	Session ID	:
		Date of last assessment	:

10. **FOR THE GAIN-I:** Once you complete the GAIN Assessment, you must generate the GRRS.

11. **FOR THE GAIN-Q:** You **do not** need to generate a report.

GAIN ABS
Build Number (Beta 3) 0.3.9.6

Main Search Logout

Client Record View

Needy Child Client Record

Treatment Episode 1 (06/03/2008)

GAIN-I (Conducted on 06/03/2008)

- GAIN-I (Conducted on 06/03/2008)
 - Continue With Interview
 - Edit Data Entry
 - View Assessment
 - Generate Validity Report
 - Generate PFR Report
 - Generate GRRS Report**
 - Generate GPRA Report
 - Generate FUL Report
 - Generate TTL Report
 - Generate Full Assessment Report
 - Generate S9 Grid Report

Assessments: GAIN

Performing the GAIN (5)

11. **GAIN-I only:** Follow the steps to generate the GRRS.

Select from the radio buttons to set how to identify the client:

☒ First Name
☐ Initials
☐ Client Number
☐ Enter your own

GAIN-I Recommendation and Referral Summary (G-RRS)

Name: Needy Staff: Jennifer Conrad
Date of Birth: n/a Screening Date: 6/3/2008

Presenting Concerns and Identifying Information

Needy is a 0-year-old [MISSING DATA] [MISSING DATA]. Needy [MISSING DATA] with no apparent physical abnormalities. Needy was referred to witestone by [MISSING DATA]. Needy stated that the reason for coming to witestone was because [MISSING DATA]. Needy [MISSING DATA]. Needy [MISSING DATA].

Prompt: Marital status; Number of children; Grooming appearance; Deferred by; Enter reason for coming to treatment; School or training history; Job history; Enter custody arrangements, living situation, current address, parents' marital status, addresses of relevant parents or guardians

Add your own prompt here:

☒ Prompt needs to be reviewed ☐ Prompt reviewed but not resolved ☐ Prompt resolved

12. If you did a GAIN-I, make sure you save your GRRS.
13. Once you complete the GAIN Assessment and your activities in GAIN ABS, you can log out and close the browser for GAIN ABS.

REMEMBER: If you encounter any problems with the GAIN ABS website, please contact abssupport@chestnut.org or 309-451-7700 for assistance. Your WITS Administrator cannot help you with GAIN ABS issues. Online GAIN training: <http://training.gainabs.org/>.

Assessments: GAIN

Recording GAIN Activities in WITS: GAIN-I

- Any GAIN-I's previously synced will appear in the GAIN Domain portion of the screen.

- If you have performed a GAIN-I, you must download the GRRS summary from GAIN-ABS. Click on **Download/Update GAIN Summaries** to download a new GRRS, or to update the GRRS for the current client. You will get a confirmation message for a successful download.

- Once you complete a GAIN-I and download the summary, you will be able to view it from the Client Activity List Screen. Clicking "Review" will take you to the GAIN screen, where you should click "Review" **while holding your control key**. This will bring up a copy of the client's GRRS in WITS.

Note: The GAIN-I is now a consentable object.

Note: If you need to make changes to the GRRS, they must be made in GAIN-ABS, then you must Download/Update a new Summary. WITS only stores the latest copy of the GRRS.

Idaho-WITS

User: Conrad, Jennifer
Loc: Administrative Agency., Administrative Unit
Client: Child, Needy | 2559301009100 | Case #: 1

Diagnosics Logout

April 2008, Ver 1

In order to start a GAIN assessment, you must do the following:

1. Complete Client Profile Module in WITS.
2. Use the Sync Client Information action button below to send the Client Profile information to GAIN.
3. When you receive an information message that the record was "Successfully Synced", click on the Perform GAIN Assessment action button to launch a GAIN window. You will need a GAIN account to do this. (If you don't have a GAIN Account, please call your WITS Administrator).
4. After completing the GAIN-I Assessment, click the Download / Update GAIN Summaries action button, which will pull the GAIN information back into WITS so that it can become part of the Client's electronic medical record.
5. To view a completed GAIN-I Summary, click the Review action button.
6. If you are doing a GAIN-Q Assessment, click the action item "Create GAIN Q Activity" after performing the assessment in the GAIN ABS system. This will create an activity record for this client's GAIN-Q Assessment.

GAIN Domain	Created Date	Last Sync Date	Sync Status	Actions
GAIN-I	6/3/2008	6/3/2008	Success	Sync Review View Error Log

Administrative Actions

[Sync Client Profile](#) [Perform GAIN Assessment](#) [Download/Update GAIN Summaries](#) [Create GAIN Q Activity](#)

Idaho-WITS

User: Conrad, Jennifer
Loc: Administrative Agency., Administrative Unit
Client: Child, Needy | 2559301009100 | Case #: 1

Diagnosics Print View Logout

April 2008, Ver 1

Client Activity List

Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	4/3/2008	1/2/2008	In Progress Details	Review
Intake Transaction	4/25/2008	4/25/2008	In Progress Details	Review
GAIN-I Summary	6/3/2008	6/3/2008	Completed	Review

Assessments: GAIN

Recording GAIN Activities in WITS: GAIN-Q

If you have performed a GAIN-Q, you must create a GAIN-Q activity in WITS once you complete the assessment on GAIN-ABS.

1. Click on **Create GAIN-Q Activity** to create an activity record for this client and to record the activity as complete in WITS.
2. You will be asked if you are sure you want to create a GAIN-Q activity. Click **Yes**.
3. Once you complete a GAIN activity and record it in WITS, you will be able to view the activity and its date from the Client Activity List Screen.

NOTE: The GAIN-Q is now a consentable object.

Idaho-WITS

User: Conrad, Jennifer
Loc: Administrative Agency, Administrative Unit
Client: Child, Needy | 2559301009100 | Case #: 1

Diagnosics Logout

April 2008, Ver 1

Home Page
Agency ▶
Client List ▼
Client Profile ▶
Activity List ▼
Intake
Assessments ▼
GAIN
Consent
Referrals
Episode List
System Administration ▶
My Settings ▶
Reports

In order to start a GAIN assessment, you must do the following:

1. Complete Client Profile Module in WITS.
2. Use the Sync Client Information action button below to send the Client Profile information to GAIN.
3. When you receive an information message that the record was "Successfully Synced", click on the Perform GAIN Assessment action button to launch a GAIN window. You will need a GAIN account to do this. (If you don't have a GAIN Account, please call your WITS Administrator).
4. After completing the GAIN-I Assessment, click the Download / Update GAIN Summaries action button, which will pull the GAIN information back into WITS so that it can become part of the Client's electronic medical record.
5. To view a completed GAIN-I Summary, click the Review action button.
6. If you are doing a GAIN-Q Assessment, click the action item "Create GAIN Q Activity" after performing the assessment in the GAIN ABS system. This will create an activity record for this client's GAIN-Q Assessment.

GAIN Domain	Created Date	Last Sync Date	Sync Status	Actions
GAIN-I	6/3/2008	6/3/2008	Success	Sync Review View Error Log

Administrative Actions

[Sync Client Profile](#) [Perform GAIN Assessment](#) [Download/Update GAIN Summaries](#) [Create GAIN Q Activity](#)

Home Page
Agency ▶
Client List ▼
Client Profile ▶
Activity List ▼
Intake
Assessments ▶
Consent
Referrals

Client Activity List				
Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	4/24/2008	4/24/2008	In Progress Details	Review
Intake Transaction	4/24/2008	4/24/2008	Completed	Review
GAIN-Q Assessment	4/24/2008	4/24/2008	Completed	Review
Consent (D7 Treatment Program)	4/24/2008	4/24/2008	Completed	Review
Referral (D7 Treatment Program)	4/24/2008	4/24/2008	Completed	Review
Consent (First Responders)	5/5/2008	5/5/2008	Completed	Review

Assessments: GAIN

Viewing the GRRS

If you have downloaded the GRRS (GAIN-I Summary) using the GAIN Administration Screen, you will be able to view the GRRS report and print it from WITS.

1. From the Client Activity List, click **Review** for the GAIN-I Summary activity.

Idaho-WITS User: Conrad, Jennifer Loc: Administrative Agency, Administrative Unit Client: Ben, Ben | 1209966557120 | Case #: 2 April 2008, Ver 1

Diagnosics Print View Logout

Activity	Activity Date	Created Date	Status	Actions
Consent (D7 Treatment Program)	12/1/2007	4/18/2008	Completed	Review
GAIN-I Summary	12/4/2007	3/25/2008	Completed	Review
Consent (Idaho Office of Drug Policy)	1/1/2008	4/18/2008	Completed	Review
Consent (FEI Test)	3/1/2008	4/18/2008	Completed	Review
Client Information (Profile)	4/15/2008	1/9/2008	Completed	Review

2. This will bring you to the GAIN Administration Screen. Find the GAIN-I and click **Review**.

Note: It is critical to have “pop-ups” turned off, and it is helpful to **hold down the CTRL key while bringing up a report in WITS**.

Home Page Agency Client List Client Profile Intake Assessments **GAIN** Consent Referrals Episode List System Administration My Settings Reports

In order to start a GAIN assessment, you must do the following:

1. Complete Client Profile Module in WITS.
2. Use the Sync Client Information action button below to send the Client Profile information to GAIN.
3. When you receive an information message that the record was “Successfully Synced”, click on the Perform GAIN Assessment action button to launch a GAIN window. You will need a GAIN account to do this. (If you don't have a GAIN Account, please call your WITS Administrator).
4. After completing the GAIN-I Assessment, click the Download / Update GAIN Summaries action button, which will pull the GAIN information back into WITS so that it can become part of the Client's electronic medical record.
5. To view a completed GAIN-I Summary, click the Review action button.
6. If you are doing a GAIN-Q Assessment, click the action item “Create GAIN Q Activity” after performing the assessment in the GAIN ABS system. This will create an activity record for this client's GAIN-Q Assessment.

GAIN Domain	Created Date	Last Sync Date	Sync Status	Actions
GAIN-I	12/4/2007	3/25/2008	Success	Sync Review View Error Log

Administrative Actions

[Sync Client Profile](#) Perform GAIN Assessment [Download/Update GAIN Summaries](#) [Create GAIN Q Activity](#)

3. This will bring up a new browser window with the GRRS summary. To print, click on the browser's print icon. You can close the new browser window without affecting your current session of WITS.

GAIN-I Recommendation and Referral Summary (G-RRS)

4. Both the GAIN-I Summary (GRRS) and GAIN-Q activity can be consented and referred within WITS.

Name: Ben, Ben Evaluator: Administrator, WITS
Date of Birth: 2/20/1979 Screening Date: 3/25/2008

Presenting Concerns and Identifying Information

Lloyd is a 52 year old Caucasian/White male who is divorced and has no children. He presented as a typically groomed individual : having limited hearing or other hearing problems; having limited vision or other vision problems. He was referred to GCC by "Lisa Moore", ("Social Worker"). Lloyd stated that the reason for coming to GCC was because "I need to improve my situation, my life is out of control". Lloyd last attended school or training more than 12 months ago. Lloyd reported working more than 12 months ago.

Prompt - Enter custody arrangements, living situation, current address, parents' marital status, addresses of relevant parents/guardians Who has custody?

Following is a five axis summary of Lloyd's problems. This is followed by a narrative summary of the evaluation procedures, a detailed substance use diagnosis and treatment history, an assessment of placement and service needs, and the evaluator's recommendations for specific services and level of care/program placement to best address them.

Evaluation Procedure

As part of Lloyd's evaluation, the Global Appraisal of Individual Needs (GAIN) was orally administered by others, done with pen and paper. The evaluator reported that other people were

Consent and Referral

Consents

1. Click on the **Consent** menu item. This will display a list of all consents made for the client. Click **Review** to review any consent.
2. If you wish to add a new consent, click **Add New Client Consent Record** on the Client Consent List.
3. If you are viewing a current consent, you'll notice that once the consent has been created, it is read only.
4. From an existing Consent, you can create a referral, or you can revoke the consent.

Start Date	Disclosed To	Status	Signed?	Actions
3/11/2008	Pastor Dennis Smith	Active	Yes	Review
3/12/2008	D7 Treatment Program	Active	Yes	Review
3/24/2007	Discovery House	Active	Yes	Review
3/25/2007	D7 Treatment Program	Active	Yes	Review
4/16/2008	Idaho Office of Drug Policy	Revoked	Yes	Review
4/18/2008	Riverside Recovery	Revoked	Yes	Review
4/18/2008	Second Agency	Active	Yes	Review
4/18/2008	Idaho Office of Drug Policy	Revoked	Yes	Review
1/1/2008	Idaho Office of Drug Policy	Active	Yes	Review
4/18/2008	D7 Treatment Program	Active	Yes	Review

Client Disclosure Agreement

Note: Consented information may not be redisclosed.

Client Name: Ben, Ben
Client ID: 1209968557120

Disclosed From Agency: Administrative Agency

Entities with Disclosure Agreements

Disclosed To Agency Non System Agency

Disclosed To Entity (Non System Agency): Pastor Dennis Smith

Purpose for disclosure: Family Counseling

Consent Date: 3/11/2008

Has the client signed the paper agreement form: Yes

Client Information Options

- ☐ Admission
- ☐ Behavioral Health Assessment
- ☐ Client Screening
- ☐ DENS ASI Assessment
- ☐ DENS ASI Lite
- ☐ Discharge
- ☐ Drug Test Results
- ☐ Encounter Detail
- ☐ GAIN-Q Assessment
- ☐ GPRA Assessment
- ☐ GPRA Interview

Consent Expires Upon

- ☐ Discharge(UD) +Days
- ☐ Date Signed(DS) +Days
- ☐ Other Event(OE) Exp
- ☐ Criminal Cond (CJC) Exp

Description

Disclosure Selection

- ☐ Client Information (Profile) (UD, +10)
- ☐ GAIN-I Summary (UD, +30)

Comments

Other Disclosures

Finish Revoke

Consent and Referral

Creating New Consents

1. Enter information on the Client Disclosure agreement.
- You can consent to any agency within WITS, or to a non-system agency.
Note: While a non-system (non-WITS) agency cannot view the consent in WITS, you can still store the consent record in WITS as a part of the client's electronic health record.
- The consent date is critical as it drives the date of information available.
- You must also indicate whether or not the client has signed your paper consent form. If you answer no, the information will not be available to the agency to which you are referring the client.
- For each "Client Information Option" or domain that will be consented, you will need to indicate an expiration. The expiration can be based upon discharge date, date signed, or other event. A template has been created by the state for most general consent needs.

Note: *Because the client must sign a paper consent form, it is imperative that you maintain a system for filing consent forms as you do today. The client's signature cannot be captured or stored in WITS.*

Client Disclosure Agreement

Note: Consented information may not be redisclosed.

Client Name: Mouse, Mickey
Client ID: 180966667110
Disclosed From Agency: Idaho Department of Correction

Entities with Disclosure: [Dropdown]
Agreements: [Dropdown]
Disclosed To Agency: Non System Agency [Dropdown]
Disclosed To Entity (Non System Agency): [Text]
Purpose for disclosure: [Text]

Consent Date: 5/5/2008
Has the client signed the paper agreement form: No [Dropdown]

Client Information Options

- Admission
- Behavioral Health Assessment
- Client Information (Profile)
- Client Screening
- DENS ASI Assessment
- DENS ASI Lite
- Discharge
- Drug Test Results
- Encounter Detail
- GAIN-I Summary
- GAIN-Q Assessment

Consent Expires Upon

- ☐ Discharge(UD) +Days [Text]
- ☐ Date Signed(DS) +Days [Text]
- ☐ Other Event(OE) Exp [Text]
- ☐ Crim Just Cond (CJC) Exp [Text]

Disclosure Selection

Description: [Text]

Comments: [Text]
Other Disclosures: [Text]

Cancel Save Finish

Consent and Referral

Creating New Consents

2. Begin by entering the information about the agency to which the consent will be made. This can be an agency in WITS, or a non-system agency.

Note: If you are disclosing to a non-system agency, you must type the name into the “Disclosed to Agency (Non-System Agency)” box.

3. The consent date indicates the beginning of the consent window. It defaults to today’s date, but can be changed if the client is consenting information from a prior period.

Note: If the consent is for today’s date, any activity done yesterday will not be included in the scope of the consent.

4. You must indicate whether the client has signed a paper consent form.
 - WITS includes a copy of the Idaho Criminal Justice consent form, which will be pre-filled with information from the consent you save.
 - If you will be printing the criminal justice consent form from WITS, OR if the client has not yet signed the form, you must answer “No”.
 - Once you obtain the client’s signature, you should change the “Has the client signed the paper agreement form” to “Yes”.

Note: You must file the signed paper copy in your office.

The screenshot shows the 'Client Disclosure Agreement' form. At the top, a yellow banner contains the text: 'Note: Consented information may not be redisclosed.' Below this, the form fields are populated with: 'Client Name: Mouse, Mickey', 'Client ID: 180966667110', and 'Disclosed From Agency: Idaho Department of Correction'. The 'Entities with Disclosure Agreements' dropdown is set to 'Non System Agency'. The 'Disclosed To Entity (Non System Agency)' field is empty. The 'Purpose for disclosure' field is highlighted in yellow. The 'Consent Date' is set to '5/5/2008'. The 'Has the client signed the paper agreement form' dropdown is set to 'No'. The 'Client Information Options' list includes: Admission, Behavioral Health Assessment, Client Information (Profile), Client Screening, DENS ASI Assessment, DENS ASI Lite, Discharge, Drug Test Results, Encounter Detail, GAIN-I Summary, and GAIN-Q Assessment. The 'Consent Expires Upon' section has three options: 'Discharge(UD) +Days', 'Date Signed(DS) +Days', and 'Other Event(OE) Exp', each with a corresponding input field. The 'Crim Just Cond (CJC)' option is also present with an 'Exp' field. The 'Disclosure Selection' area is a large empty box. At the bottom, there are 'Comments' and 'Other Disclosures' text areas, and three buttons: 'Cancel', 'Save', and 'Finish'.

Consent and Referral

Creating New Consents

5. Before you can save the record or print a pre-filled form, you must indicate the consented domains and expiration dates.
6. Use the Client Information Options box to select items to consent.
 - Consents must expire upon a certain date or condition. Use the radio button to indicate an expiration condition, and fill in either a date or number of days for the expiration date.
 - Use the right-facing arrows to move the Consented Items over to the Disclosure Section.

Note: Your Agency Administrator has the ability to set up default Client Information Options.

7. Once you are finished, click **Save**.
8. To print the pre-filled Idaho Criminal Justice consent form, click on the “Print Report” button on the top bar, while holding the CTRL key.
9. Once you obtain the client’s signature, you should change the “Has the client signed the paper agreement form” to “Yes”. If you do not change the answer, no information will be disclosed to the other Agency.
10. Once you have indicated the client’s signature and click “SAVE”, the consent becomes read only. It can be revoked by the client, but cannot be changed.

The screenshot shows the 'Client Disclosure Agreement' form in the Idaho-WITS system. The form is titled 'Client Disclosure Agreement' and includes a note: 'Note: Consented information may not be redisclosed.' The client information is as follows: Client Name: Mouse, Mickey; Client ID: 180966667110; Disclosed From Agency: Idaho Department of Correction. The form has several sections: 'Entities with Disclosure Agreements' (a dropdown menu), 'Disclosed To Agency' (a dropdown menu set to 'Non System Agency'), 'Disclosed To Entity (Non System Agency)' (a text field), 'Purpose for disclosure' (a text field), 'Consent Date' (a date field set to 5/5/2008), and 'Has the client signed the paper agreement form' (a dropdown menu set to 'No'). There are three main sections for selecting items to consent to: 'Client Information Options', 'Consent Expires Upon', and 'Disclosure Selection'. The 'Client Information Options' section lists various items: Admission, Behavioral Health Assessment, Client Information (Profile), Client Screening, DENS ASI Assessment, DENS ASI Lite, Discharge, Drug Test Results, Encounter Detail, GAIN-I Summary, and GAIN-Q Assessment. The 'Consent Expires Upon' section has three radio buttons: 'Discharge(UD)', 'Date Signed(DS)', and 'Other Event(OE)'. Each radio button has a corresponding '+Days' field. The 'Disclosure Selection' section is a large empty box. At the bottom of the form, there are 'Comments' and 'Other Disclosures' text fields. The form has 'Cancel', 'Save', and 'Finish' buttons at the bottom right. The footer of the page shows the URL 'http://idaho-training.witsweb.org/System.aspx', the user 'User: Conrad, Jennifer', the location 'Loc: Administrative Agency, Administrative Unit', the client 'Client: Intake, Close | 10810187763403L | Case #: 1', and the 'Idaho-WITS' logo. There are also 'Print Report' and 'Print View' buttons in the bottom right corner.

Consent and Referral

Creating Referrals

1. You may create a referral by clicking on **Create Referral Using this Disclosure Agreement.**

2. Complete required fields on the Client Referral.

Note: For "Continue this Episode of Care", you should answer "No."

3. Click **Save or Finish**. The referred-to agency will know about the referral as they will have an alert on their home page.
4. The Referral will become read only once the save or finish button has been clicked.

Idaho-WITS

User: Conrad, Jennifer
Loc: Administrative Agency, Administrative Unit
Client: Ben, Ben | 1209966557120 | Case #: 2

Diagnosics Print Report Print View Logout

Home Page
Agency
Client List
Client Profile
Activity List

Client Disclosure Agreement

Note: Consented information may not be redisclosed.

Client Name: Ben, Ben
Client ID: 1209966557120
Disclosed From Agency: Administrative Agency,

[Create Referral Using this Disclosure Agreement](#)

Client Referral for Mouse, Mickey

Referred By

Agency Idaho Department of Correction
Facility Test Facility
Staff Member Conrad, Jennifer
Program
State Reporting Category
Reason
If Other
Is Consent Verification Required?
Is Consent Verified?
Continue This Episode of Care?

Referred To

Signed Consents First Responders
Agency Non System Agency
Facility
Staff Member
Program
State Reporting Category
Non-System Agency First Responders
Non-System Modality
Non-System Specifier
Appt Date Undetermined

Consents Granted

Referral Status Referral Created/Pending
Projected End Date
Created Date 5/5/2008 5:21 PM

Cancel Save Finish

Viewing Referrals (Referring Agency)

You may view any consents or referrals you have made, to see the status or other information.

1. To view the Consents or Referrals for a particular client, when you are in the context of the client, click on Consent or Referral under Activity List in the left hand menu.
2. To see all Referrals made by your agency, go to Agency, then click on Referrals, then on Referrals Out.
3. Use the mover box to narrow your search by status of referral.
4. Click Go.
5. You can view a list of all referrals out and know which agencies have accepted them.

Note: Like other lists in WITS, you can sort the list by clicking on the column headers.

Idaho-WITS User: Conrad, Jennifer Loc: Administrative Agency, Administrative Unit Client: Intake, Close | 10810187765403L | Case #: 1 August 2008, Rev 2

Home Page Agency Client List Client Profile Activity List Intake Assessments **Consent** Referrals

Client Consent List Add New Client Consent Record

Start Date	Disclosed To	Status	Signed?	Actions
11/1/2008	Administrative Agency	Active	Yes	Review
11/1/2008	Bob's Treatment Agency	Active	No	Review

Idaho-WITS User: Conrad, Jennifer Loc: Administrative Agency, Administrative Unit Client: Intake, Close | 10810187765403L | Case #: 1 August 2008, Rev 2

Home Page Agency Agency List Agency Profile Aliases Contacts Governance Relationships Announcements **Referrals** Referrals In Referrals Out

Referrals for Administrative Unit (Export)

Referral Status Codes: Placed/Accepted, Referred Terminated, Refused Treatment, Rejected by Program

Search Criteria: Referral Created/Pending

Go

Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments

Idaho-WITS User: Conrad, Jennifer Loc: Administrative Agency, Administrative Unit Client: Intake, Close | 10810187765403L | Case #: 1 August 2008, Rev 2

Home Page Agency Agency List Agency Profile Aliases Contacts Governance Relationships Announcements **Referrals** Referrals In Referrals Out Facility List

Referrals for Administrative Unit (Export)

Referral Status Codes: Placed/Accepted, Referred Terminated, Refused Treatment, Rejected by Program

Search Criteria: Referral Created/Pending

Go

Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
Review	101012005478020	Dole, Bob	1/1/2000	11/7/2008	Provider Training Agency/Training Facility	Outpatient Detoxification	Referral Created/Pending	Administrative Unit	

Consent and Referral

Accepting Referrals

1. When you log into the system, you are directed to your home page. This tells you how many clients have been referred into your agency.

There are currently 1 people that have been referred in.

Home WITS Version : April 2008, Ver 1

Announcements

Summary	Posted Date	Start Date	Actions
I want everyone to have fun at the training today	5/12/2008 1:35 AM	5/11/2008	Review

Schedule for: [Refresh](#) [Edit/Add Schedule](#)

Start	End	Summary	Status	Actions

2. To find clients that have been referred into the agency, go to **Agency -> Referrals -> Referrals In** on the left hand menu.

Home Page
Agency ▾
Agency List ▾
Agency Profile ▶
Aliases
Contacts
Governance ▶
Relationships ▶
Announcements
Referrals ▾
Referrals In
Referrals Out
Facility List ▶

Referrals for Administrative Unit [\(Export\)](#)

Referral Status Codes: Placed/Accepted, Referral Created/Pending, Referred Terminated, Refused Treatment

Search Criteria:


[Go](#)

Actions	Name	Created Date	Referred To Modality	Referral Status	Referred To Facility	Non System Agency	Referral Comments

3. Use the Search criteria to search for referrals in. You can narrow the search by Referral Status Codes (using the right pointing arrow to move them to the Search Criteria box) or you can search for all referrals in by clicking **Go**.

Consent and Referral

Accepting Referrals

4. Once you click **Go**, the system returns all appropriate items.
5. Click on **Review** to view the referral you wish to see. 
6. Referrals are always sent with a Referral Status of "Referral Created/Pending". It is up to your agency to change the status, either rejecting the referral or accepting it by choosing the status of "Placed/Accepted". Click **Finish**.

Note: All other information for this referral is read-only.

Referrals for Administrative Unit *(Export)*

Referral Status Codes

Placed/Accepted
 Referral Created/Pending
 Referred Terminated
 Refused Treatment

Search Criteria

Go

Actions	Name	Created Date	Referred To Modality	Referral Status	Referred To Facility
Review	Aloha, Lulu	11/30/2007	Family Services	Placed/Accepted	Administrative Unit
Review	Mouse, Minnie	11/30/2007	Family Services	Referral Created/Pending	Administrative Unit

Client Referral for Mouse, Minnie

Referred By

Agency: Riverside Recovery
 Facility: Riverside Recovery
 Staff Member: Stensrude, Kristine
 Program:
 State Reporting Category:
 Reason: Service not available at this facility
 If Other:
 Is Consent Verification Required? Yes
 Is Consent Verified? Yes
 Continue This Episode of Care? No

Referred To

Signed Consents: Administrative Agency,
 Agency: Administrative Agency,
 Facility: Administrative Unit
 Staff Member:
 Program: New Horizons
 State Reporting Category: Woman with children outpatient
 Non-System Agency:
 Non-System Modality:
 Non-System Specifier:
 Appt Date: Undetermined

Comments

Referral Status: **Referral Created/Pending**

Projected End Date:

Created Date: 11/30/2007 5:37 PM

Consents Granted

Cancel **Finish**

Consent and Referral

Accepting a Referral

1. Once you accept the referral, you will be taken to the client profile screen for that client. This is a direct copy of the client profile information in the Referred-from Agency.
2. You may update the client profile if necessary.
3. Note that the Unique Client ID will be carried over from the first agency. It is not recreated and remains the primary method for linking clients across all agencies in the State.
4. If you wish to view the activities that have been consented to you for this particular client, you must query on the client in the client search screen. Go back to the client list screen, and query on the client name or other identifier.
5. This will give you a list of all consents from outside agencies for this particular client. You may click on the **Activity List** for the consent you wish to view, to see the consented activities associated with that particular consent.
6. Note that you cannot re-consent the activities to another agency. You must perform activities in your own agency, get client consents and refer them to other agencies.

Client Profile

First Name	Minnie	Provider Client ID	
Middle Name		Client ID	2749034788100
Last Name	Mouse	Record Created By	Conrad, Jennifer
Gender	Female	Last Updated By	Conrad, Jennifer
DOB	7/4/1980	Created Date	5/12/2008 1:03 PM
SSN	413-69-8374	Last Updated Date	5/12/2008 1:03 PM
Driver's License			
Has paper file	Yes		

Cancel Save Finish Next

Client Search

Agency		Facility	
First Name	Minnie	Last Name	
SSN		DOB	
Client ID		Provider Client ID	
Treatment Staff		Primary Care Staff	
Case Status	All Clients	Intake Staff	
Other Number		Number Type	

Clear Go

Client List (Export)

Client ID	Full Name	DOB	SSN	Gender	Actions
2749034788100	Mouse, Minnie	7/4/1980	413-69-8374	Female	Profile Activity List

[Add Client](#)

Clients with Consents from Outside Agencies

Agency	Client Id	Client Name	DOB	SSN	Gender	Actions
Riverside Recovery	2749034788100	Mouse, Minnie	7/4/1980	413-69-8374	Female	Activity List

Consented Activity List from Riverside Recovery for Mouse, Minnie

PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT

This notice accompanies a disclosure of information concerning a client in alcohol/drug abuse treatment, made to you with the consent of such client. This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.

Activity	Case #	Activity Date	Created Date	Status	Actions
GAIN-Q Assessment	1	5/12/2008	5/12/2008	Completed	

Final Information

Closing a Case

Normally, cases are closed as individuals are discharged from treatment modalities. This feeds into TEDS reporting for many states using WITS. However, since Idaho is not currently using Admission and Discharge Screens, it will be important to close close open Intakes. This will allow a new intake when the client re-enters the system at a later date.

1. To close an open Episode of Care (Intake), click on **Review** for the intake from the Client Activity List.

Note: The client profile and intake must be completed to close the intake.

2. On the Intake Screen, enter a date in Date Closed. Click on **Save and Close this Case**.
3. The intake will become read only. Click **Finish** to exit the screen.

Client Activity List				
Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	4/10/2008	4/9/2008	In Progress (Details)	Review
Intake Transaction	4/10/2008	4/10/2008	In Progress (Details)	Review

Intake Case Information

Intake Facility: Administrative Unit
Intake Staff: Conrad, Jennifer
Initial Contact: By Appointment
County of Res.: ADAMS
Source of Referral: Alcohol Detox or Residential Program
Referral Contact:
[Add Referral Contact Info](#)

Case #1
Case Status: Open Active
Date of First Contact: 4/3/2008
Intake Date: 4/10/2008
Pregnant: No
Due Date:
HIV Positive:
Past IV Drug Use: No

Presenting Problem (In Client's Own Words)
djfdkjfdkjfdk

Special Initiative
Acquired Brain Disorders
Adult with Severe and Persistent Mental Illness
Adult with Severe Emotional Disturbance
Child/Youth with Severe Emotional Disturbance

Special Initiative Selected
Adult with Organic Disorder w/o SED

Inter-Agency Service
Child Protective Services (OCS)
Court/Legal Interface
Developmental Disabilities
Domestic Violence

Inter-Agency Service Selected

Date Closed:
[Save & Close this Case](#) Cancel Save Finish

Final Information

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Child Protective Services (OCS)
Court/Legal Interface
Developmental Disabilities
Domestic Violence

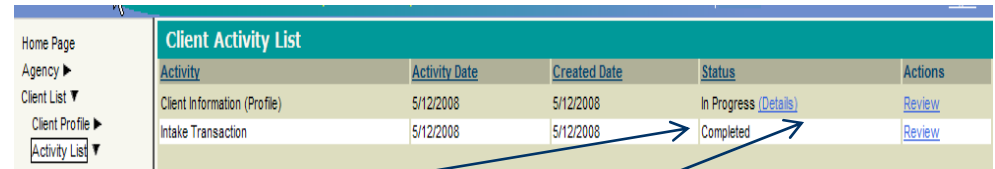
Inter-Agency Service Selected

Date Closed:
[Save & Close this Case](#) [Cancel](#) [Save](#) [Finish](#)

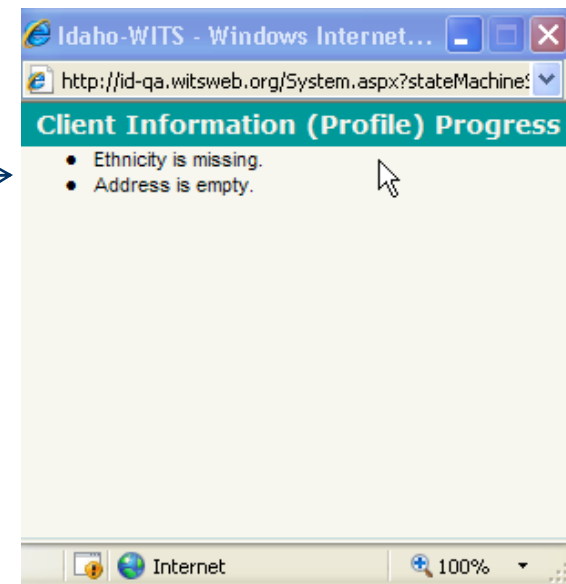
Final Notes

Client Activity List

1. The Client Activity list is a great source of information as the Agency begins to work with clients. From this, you can find activities that have been performed, their dates, and details associated with them.
2. Another key item to note is that some activities are "Completed". This means that all fields in light yellow have been completed.
3. Activities which say "In Progress" indicate that light yellow fields have not all been completed. These are usually associated with State or TEDS/NOMs reporting. By clicking on the Details action link, you will get a small window showing you the items that must be completed.



Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	5/12/2008	5/12/2008	In Progress	Details Review
Intake Transaction	5/12/2008	5/12/2008	Completed	Review



Final Notes

Reports

1. From the left hand menu, choose Reports. →
2. Choose the report you would like to run.
3. Enter the report criteria, and click **Go**.
4. Once the report returns, WITS gives you the option to export the report, print, or finish.

Note: Not all reports will be useful at this time with Idaho's limited scope. However, there are a few that show referrals as well as client profile information.

Export Finish

Referrals in by Agency

Purpose: This report lists counts and percentages for referral status for all clients who have been referred in by outside agencies. Percent referred by this agency and percent referred in from all agencies out of total clients is also given.

Report Criteria
Agency: Administrative Agency,

Agency Referred by	# Placed/Accepted	% Placed/Accepted	# Referral Created/Pending	% Referral Created/Pending	# Referral Terminated	% Referral Terminated	# Refused Treatment	% Refused Treatment	# Rejected by Program	% Rejected by Program	# Placed on the Waitinglist	% Placed on the Waitinglist	Total Referred	% Ref by t Age
Riverside Recovery	3	100%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	3	100
[Totals]	3	100%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	3	100

Final Notes

How To Get Help

- To obtain a Production login (for live clients), please contact Don Corbridge at Corbridd@dhw.idaho.gov or call 208-332-7231. You will be sent an Access Form, and your account will be created once you complete the form and return it to Don.
- For issues with the GAIN-ABS system, contact abssupport@chestnut.org or 309-451-7700.
- For issues with WITS, contact either your Agency Administrator (larger Provider Agencies) or Don Corbridge at Corbridd@dhw.idaho.gov or call 208-332-7231.
- For question about administering the GAIN instruments: <http://training.gainabs.org/>